



State of California

Franchise Tax Board

STATE OF CALIFORNIA

TAX PROGRAM TECHNICIAN II

DEPARTMENTAL PROMOTIONAL EXAMINATION

Location: Sacramento

Final Filing Date: July 29, 2015

MISSION STATEMENT

Mission of the Franchise Tax Board: Our mission is to provide the services and information to help taxpayers file accurate and timely tax returns and pay the proper amount owed. To accomplish this mission, we develop knowledgeable and engaged employees, administer and enforce the law with fairness and integrity, and responsibly manage the resources allocated to us.

EEO

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

WHO SHOULD APPLY?

Applicants who meet the minimum qualifications as stated below may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

This is a promotional examination for Franchise Tax Board (FTB). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service, with the Franchise Tax Board, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a service-connected disability; or honorably discharged from active duty as defined in Government Code Section

18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information, Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former FTB employees may be allowed to compete under the provisions of Rule 235.

FILING INSTRUCTIONS

FINAL FILING DATE TO SUBMIT AN APPLICATION: July 29, 2015

Applications (STD. 678) are available at CalHR's website www.jobs.ca.gov or FTB's website at www.ftb.ca.gov.

Applications can be filed either:

In Person:

Franchise Tax Board
9646 Butterfield Way
Sacramento Bldg., Exam/Certification Unit
Sacramento, CA 95827

By Mail:

Franchise Tax Board
ATTN: Exam/Certification Unit
P.O. Box 550
Sacramento, CA 95812-0550

APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES AND MUST BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, or received via interoffice mail after the final filing date will not be accepted.

SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special assistance or special testing arrangements, contact Franchise Tax Board (FTB), Examination/Certification Unit at (916)845-3608, or via the California Relay Service for the Deaf or Hard of Hearing at (800)735-2929 from TTY phones and (800) 735-2922 from voice phones.

Additionally, please select the "Reasonable Accommodations" box when filling out the application.

SALARY

\$3,085.00 - \$3,864.00

ELIGIBLE LIST INFORMATION

A departmental, promotional eligible list will be established for the Franchise Tax Board. The list will be abolished 12 months after it is established unless the needs of the service and/or conditions of the list warrant a change in this period.

REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

NOTE: All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the final filing date. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), and range, if applicable. College course information **MUST** include: title, semester or quarter credits, name of institution, completion dates, and degree (if applicable).

Applications/resumes received without this information may be rejected.

NOTE: It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

MINIMUM QUALIFICATIONS

Either I

Experience: In the California state service, one year of experience in the Franchise Tax Board performing duties equivalent to those of a Tax Program Technician I, Franchise Tax Board, which provides knowledge of the regulations and policies governing the tax and nontax programs of the Franchise Tax Board.

Or II

Experience: Three years of experience in a governmental, financial, or private organization, in one or a combination of the following:

1. Extensive customer/public contact with primary responsibility for receiving, resolving or adjusting customer accounts, including the ability to resolve collection accounts and interpret technical or regulatory information; **or**
2. Activities which provide knowledge of the regulations and policies governing the tax and non-tax programs of the Franchise Tax Board.

(Experience in the California state service applied toward these requirements must include at least one year at a level of responsibility equivalent to that of a Tax Program Technician I, Franchise Tax Board which provides knowledge of the various tax and non-tax programs administered by the Franchise Tax Board.)

(Education above the 12th grade may be substituted for this pattern on a year-for-year basis. **Course work must include two courses in either, accounting, math, computer science, business administration or public communications.** Public speaking persons who will complete the course work requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment.)

NOTE: Qualifying experience may be combined on a proportionate basis if the requirements stated above include more than one pattern and are distinguished as "Either I," "or II," "or III," etc., unless otherwise stated.

PROOF OF EDUCATION

Applicants using education to meet the minimum requirements must provide a copy of their diploma, official/unofficial transcript, statement and/or evaluation from an accredited U.S. college or university with their examination application. If an applicant is not able to provide proof of education from a recognized institution at the time of hire, their name may be removed from the eligible list(s).

FOREIGN DEGREES

Applicants with foreign transcripts must provide an official/unofficial foreign transcript evaluation that indicates the number of units to which his/her foreign course work is equivalent. FTB accepts foreign transcript evaluations that are completed by one of the agencies approved by the California Commission on Teachers Credentialing. Agencies accredited by the Commission for Foreign Transcription Evaluation may be found on the Commission's website: www.ctc.ca.gov.

NOTE: All documents submitted become the property of the FTB. Do not submit original diplomas with the examination application.

POSITION DESCRIPTION

This is the advanced journey level of the series. Under general direction and with little day-to-day supervision, incumbents serve as the expert staff resource and are independently responsible for the most difficult and complex work assignments in the areas of public service, audit, collections, account resolution and transactions, and technology applications. Incumbents may act as a resource to management and staff for more complex workload assignments and tasks, such as assisting with complex account resolution and providing support to help desks. Incumbents may also serve as a team leader or technical expert for special or difficult projects, and act as a lead for first-line supervisors in routine settings over Tax Program Technicians I, Franchise Tax Board.

Positions exist in Sacramento.

EXAMINATION INFORMATION

Written Examination -- Weighted 100%

This examination will consist of a written test weighted 100%. Candidates must attain an overall minimum score of 70.00% in order to be placed on the eligible list.

Hand-held calculators will be permitted, but will not be provided by the department.

Note: Cell phones, palm pilots, and other electronic devices may not be used as a calculator during this examination.

CANDIDATES WHO DO NOT APPEAR FOR THE WRITTEN EXAMINATION WILL BE DISQUALIFIED.

NOTE: If conditions warrant, this examination may utilize an evaluation of each candidate's experience and education compared to a standard developed from the class specification. For this reason, it is especially important that candidates take special care in accurately and completely filling out their application. List all experience relevant to the "Requirements for Admittance to the Examination" shown on this announcement.

SELECTION PLAN

It is anticipated the written examination will be administered in September/October 2015. Candidates who meet the minimum qualifications will be contacted by mail with specific date(s), time, and location.

SCOPE OF EXAMINATION

Candidates should be prepared to answer pre-determined, job-related questions identified under the Knowledge, Skills, Abilities, and Personal Characteristics.

KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS

Knowledge of:

1. Provisions of the rules, regulations, organization, and procedures of FTB to educate taxpayers and perform necessary job requirements
2. One or more applicable tax or non-tax laws to ensure effective completion of job assignments
3. One or more of the functions, applications, or processes administered and performed by the FTB
4. State tax laws and/or corporate laws to educate taxpayers and/or perform necessary job requirements
5. Departmental and unit procedures and guidelines to complete workloads in compliance with FTB standards
6. The structure of business (e.g., LLC, partnerships, corporations) for compliance of tax laws
7. Various programs (e.g., ADINT, ARCS, TI, etc.) in order to conduct account related activities
8. FTB mainframes and databases (e.g., TI, ARCS, INC) to complete job assignments
9. The internet, email, and other basic PC functions to conduct work related activities
10. Problem-solving techniques and processes to facilitate the identification and resolution of problems and issues related to the completion of work assignments
11. Decision-making techniques and processes to identify and make appropriate decisions from a variety of alternatives
12. Basic customer service skills to effectively represent FTB while assisting customers
13. Principles and processes for providing customer service, including customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction
14. The structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar

Ability to:

1. Write memos and/or letters using proper grammar, punctuation and sentence structure
2. Write effectively using the English language to convey information
3. Review forms for content, accuracy and completeness
4. Verbally communicate using the English language to effectively convey information to individuals with varying levels of understanding
5. Work cooperatively and productively as a member of a team to achieve a common goal
6. Explain provisions of governmental, tax or non-tax rules, regulations, and departmental procedures and policies
7. Accept constructive feedback regarding work product and practices to continually improve work performance
8. Establish and maintain cooperative and professional relations with other departmental staff, outside agency personnel, contractors, customers, and/or the public
9. Listen carefully and give full attention to what other people are saying, taking time to understand the points being made, asking questions when appropriate without interruption
10. Build consensus and agreement to resolve issues involving differing opinions and viewpoints
11. Work under the pressure of tight timelines when completing projects or assignments
12. Multi-task and manage multiple changing, complex and/or competing priorities to complete tasks in appropriate timeframes
13. Organize and manage time to maintain workflow and meet deadlines
14. Prioritize assignments and projects to ensure completion within established timeframes and by expected deadlines
15. Identify information, materials, and resources needed to complete a project or assignment
16. Work independently on projects or assignments without close supervision or detailed instructions
17. Apply policies and procedures in the completion of work assignments
18. Utilize personal computer systems and software applications in the performance of work
19. Recognize potential conflicts/problems in the work environment and know where to direct concerns
20. Make appropriate decisions based upon the facts and information available
21. Maintain confidentiality to ensure compliance with the applicable laws related to taxpayer privacy (e.g.,

information practices act)

22. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer to appropriate sources for resolution
23. Use logic and reasoning to identify the strengths and weaknesses of alternative approaches, solutions, or conclusions to allow for an effective resolution of the problem
24. Serve as a team leader to direct team members to achieve desired goals
25. Provide clear and accurate instructions and directions to individuals with varying levels of understanding
26. Verbally explain and clarify policies, procedures, and issues for audiences with varying levels of understanding
27. Extract specific, relevant data and information from a larger body of materials
28. Read and interpret written and/or numerical data to provide information to the public, FTB staff and other governmental agencies
29. Accurately and quickly enter data into a computerized database
30. Analyze and evaluate situations and information using logic to address work-related issues and problems
31. Perform basic mathematical computations (e.g., addition, subtraction, multiplication, division, ratios, percentages) to verify or adjust numerical information (e.g., taxpayer information and claims)
32. Effectively use a calculator for performing basic mathematical computations (e.g., addition, subtraction, multiplication, division, percentage) in order to complete job assignments
33. Present numerical data in a clear and logical format (e.g., tables, tax computations)
34. Determine the accuracy of various mathematical calculations
35. Interpret and analyze numerical data accurately

BENEFITS

To learn more about the comprehensive benefit package please visit the CalPERS website at <http://www.calpers.ca.gov>.

VETERANS' PREFERENCE

Veterans' Preference will not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference.

CAREER CREDITS

Career Credits will not be added to the final score of this examination.

CONTACT INFORMATION

For additional information regarding this examination, please contact the Franchise Tax Board Examination/Certification Unit at (916) 845-3608.

DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:
<http://jobs.spb.ca.gov/wvpos/jobspecs.cfm>

GENERAL INFORMATION

The Franchise Tax Board (FTB) reserves the right to revise the examination plan to better the needs of the service if the

circumstances change under which this examination was planned. Such revision will be in accordance with civil service laws and rules and all candidates will be notified.

It is the candidate's responsibility for an examination without a written feature to contact the Franchise Tax Board three weeks after the final filing date if he/she has not received any notification.

It is the candidate's responsibility for an examination with a written feature to contact the Franchise Tax Board six weeks after the final filing date if he/she has not received any notification.

If a candidate's notice was not received due to a verified postal error, he/she will be rescheduled upon written request. It is the candidate's responsibility to contact the Franchise Tax Board at (916) 845-3608.

Examination Locations: When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

Examination Applications are available at www.jobs.ca.gov, CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

If you meet the requirements stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

Candidates needing special testing arrangements due to a disability must mark the appropriate box on the application and/or contact the testing department.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

Promotional Examinations Only: Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at <http://www.spb.ca.gov/>.

If High School Equivalence is Required: Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis. NOTE: For peace officer classifications please refer to the testing department for special requirements.

Veterans' Preference: California Law (Government Code 18971-18979) allows the granting of Veterans' Preference in Open entrance and Open, Non-Promotional entrance examinations. Veterans' Preference will be granted to all

competitors who are successful in these types of examinations, and who qualify for and have requested the Veterans' preference by mail. In Open entrance examinations, Veterans' Preference is granted to competitors who achieve a passing score, shall be placed in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for Veterans' Preference.

Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference. Permanent State civil service status means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned or were dismissed from State civil service are not eligible to receive Veterans' Preference. Veteran status is verified by CalHR.

How to Apply for Veterans' Preference: Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application ([CalHR 1093](#)) which is available at www.jobs.ca.gov or from CalHR, 1810 16th Street Sacramento, CA 95811 and the Department of Veterans Affairs. For additional information, go to Department of Veterans' Affairs website at www.cdva.ca.gov.

Felony Disqualification: You are disqualified from being employed as a peace officer if: (1) You have been convicted of a felony in California or any other state; (2) you have been convicted of any offense in any other state which would have been a felony if committed in California; (3) you have been charged with a felony and adjudged by a superior court to be mentally incompetent; (4) you have been adjudged addicted or in danger of becoming addicted to narcotics, convicted, and committed to a State institution. If you have been convicted of a felony, you may be allowed to participate in this examination if your conviction(s): (1) has/have been sealed under Penal Code Section 851.7, 851.8, 1203.45, or Health and Safety Code Section 11361.5; (2) has/have been expunged or is/are expugnable pursuant to Health and Safety Code Section 11361.5 regarding marijuana offenses; (3) was/were stipulated or designated to be a lesser included offense of marijuana possession under Health and Safety Code Section 11557 or 11366.

TDD is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800- 735-2929 or from voice phone: 1-800-735-2922.

Franchise Tax Board, Examination/Certification Unit

P.O. Box 550, Sacramento, CA 95812-0550

Phone: (916) 845-3608

Website: www.ftb.ca.gov